

PAYMENT PROVISIONS
WORKFORCE SERVICES
NOVEMBER 1, 2018-JUNE 30, 2019
ARBOR E&T, LLC
(NORTH MIAMI BEACH)

I. Payment: Subject to the availability of funds to the SFWIB, the maximum amount payable for services rendered under this **performance** fixed rate-based Contract shall not exceed **\$780,370.00**. The Contractor agrees that payment shall be made only with **funds earned under this Contract** as set forth herein.

A. Fixed Rate Job Placement Unit Payment: The SFWIB agrees to pay the Contractor an Annual Job Placement Unit Payment, not to exceed **\$780,370.00** for the delivery of workforce services provided in accordance with the terms and conditions of this Contract. The Monthly Job Placement Base Funding will be determined by dividing the awarded Job Placement Base Funding by the number of months of the contracted period. **The Monthly Payment amount is set forth in the Payment Provision Table (Attachment 1-Part A).** The Monthly Job Placement Amount Earned, up to the monthly Maximum, shall be invoiced as set forth in the **Article IV, Section J -Monthly Invoice Requirements** of the Contract.

If the Contractor fails to achieve the monthly minimum number of Job Placements unearned as indicated in the **Payment Provision Table (Attachment 1-Part A)**, the SFWIB shall withhold the remaining unearned monthly Job Placement Base Funding.

Note: A Job Placement standard has been delivered when the Contractor satisfactorily completes the required number of monthly job placements set forth in the **CSSF Balanced Scorecard Performance Requirement (Attachment 3 of Exhibit A, Statement of Work)**, which is based upon verified job placements that are (Obtained Employment "OE" and Direct Job Placement "DJP") reported in the Employ Miami-Dade (EMD)/Employ Monroe (EM) database.

B. Job Placements Categories

Job Placements defined in the **CSSF Specifications for Workforce Balanced Scorecard Report (Attachment 4 of Exhibit A, Statement of Work)** shall be paid when the conditions are met for the following:

- **Wagner-Peyser (WP) Obtained Employment (OE)**
- **Wagner-Peyser (WP) Universal Direct Job Placement (DJP)/Direct Employment:**
 - **Universal**
 - **WIOA Individualized Adult/Dislocated Worker (DW)**
 - **WIOA Individualized Job Seekers with Disabilities**
 - **WIOA Individualized Veterans or Ex-Offenders**
 - **WIOA Individualized Reemployment Assistance (RA) Claimant or Homeless Person (HP)**
 - **WIOA Individualized TANF/Career Advancement Program (CAP) or Supplemental Nutrition Assistance Program (SNAP)**
 - **Training Related Milestones/Placements**

C. Conditions of Job Placements (OE or DJP)

1. A Job Placement requires a participant to be fully registered in EMD/EM. The full registration consists of the (Background (Education Profile + Employment History), and active (viewable to employers) Resume, **valid** telephone number and email address) and must be completed prior to the referral date. Staff will verify, prior to placement, that participant has a working telephone number available where they can be reached. All participants, as part of their initial EDM/EM registration, will be encouraged to create an email address for use in job placement. If a participant does not have an email address, the Contractor shall provide instruction to the participant on how to create an account.
2. A Job Placement shall count for performance and payment only if the result is recorded in EMD/EM WP during the reporting period of **November 1, 2018 – June 30, 2019**.
3. A Job Placement shall count for performance and payment in the month that the Job Placement was recorded in EMD/EM WP.
4. A Job Placement shall count only once per distinct social security number for the same jobseeker within the period of **November 1, 2018 – June 30, 2019**. Under no circumstance will payment be made for an obtained employment or a direct job placement for individuals registered in EMD/EM with a pseudo and/or unverifiable social security number. If a participant has been placed in employment by a refugee provider (Direct or Self Placement) in the same program year that participant cannot be entered as a Direct Job Placement by the Contractor. Job Placement categories include:
 - i. OE/Universal/WIOA:
 1. OE: a fully registered jobseeker who secures employment within 180 calendar days of receiving one or more staff assisted reportable services.
 2. Universal: a fully registered jobseeker that secures a Direct Job Placement and does not meet the criteria of a WIOA placement.
 3. WIOA: a fully registered jobseeker that is enrolled in WIOA and is a participant of one of the eight WIOA individualized categories (C.2, C.3, C.4, C.5, and C.6).
 - ii. WIOA: a fully registered jobseeker that is placed into a PWE shall be paid at the appropriate WIOA Individualized category placement rate once the participant has started the PWE.
 - iii. WIOA Secondary Placement: A contractor shall be paid \$750.00 for an active WIOA participant whom the contractor continues to engage after initial placement and subsequently places said individual in employment with a wage rate of \$14.58 or higher. The contractor must also successfully close the participants WIOA Application. The placement can be earned financially, but will not count a second time as a placement in the **CSSF Balanced Scorecard Performance Requirement (Attachment 3 of Exhibit A, Statement of Work)**.
5. A Job Placement's hire date shall not be a return date to the same employer. There must be a break in employment of at least 120 days and/or show a new hire date if job placement is with the same employer.
6. A duplicate (more than one hire reported for same SSN and employer) DJP hire shall count for performance and payment for the initial (first referral) referring center/location in EMD/EM WP if the participant is referred and a job placement to the same employer occurs in multiple centers/location.

7. If a Center creates a job order for an employer for which there is already an active/open job order and a referral is given to a job seeker who has already been referred to the same/similar position with the same employer, the subsequent referral will be disallowed. Centers are prohibited from attempting to or circumventing the system by creating duplicate job orders and referrals for the same job seekers. The SFWIB Job Bank will determine the validity of secondary job orders for the same employer and positions.
8. A Job Placement shall be verified and recorded in EMD/EM WP before the soft exit date to be eligible for performance and payment.
9. If the DJP is with a staffing agency, the Contractor must also provide documentation (i.e. pay stub or payroll register) that authenticates the participant was assigned to a worksite and has earned wages. The first paystub after start date is preferred. This does not apply to seasonal or temporary jobs as defined below.
10. A DJP associated with a Seasonal or Temporary period of employment (anticipated duration being 150 days or less of employment) shall not count as WIOA Individualized Job Placement Types and only count a Universal Job Placement Type for performance and paid at half of the Universal Job Placement Type payment rate. A Contractor entering part-time employment opportunities as full-time opportunities will be considered an attempt to defraud.
11. A Job Placement as a result of Self-Employment shall only count as an OE and not a DJP for performance and payment. Self-employed Job Seekers are not allowed to sign their own employment verifications. Centers must provide proof of payment/earnings received by the self-employed job seeker. If a participant has been placed in employment by a refugee provider (Direct or Self Placement) in the same program year that participant cannot be entered as a DJP.
12. A Job Placement defined as Part-Time (less than 30 hours per week) shall only count as a Universal Job Placement Type for performance and paid at half of the Universal Job Placement rate. Entering part-time employment opportunities as full-time opportunities will be considered an attempt to defraud and will be disallowed.
13. Placements to Volunteer Jobs shall not count towards a Job Placement (DJP or OE) for performance and payment.
14. If the OE registration office is different from the office that provided a reportable service within 90 days before the hire and the office that provided the reportable service was the only office, then the office that provided the reportable service will be given the OE credit for performance and payment.
15. If the DJP is a WP Job Development, then the job development contact (activity code 123) must be on or prior to the hire date and it must be properly documented in EMD/EM.
16. A contractor may **NOT** move or share placements with another center in an effort to achieve placement requirements. Any movement or sharing of placements will be considered a breach of contract.

Note: A DJP that is a WP Job Development with a job development contact (activity code 123) on the same date of the hire date is the exception and it shall not be the norm.

D. Maximum Monthly Placements

1. Each contracted provider (by center) will be required to meet the performance requirements as set forth in the **CSSF Balanced Scorecard Performance Requirement (Attachment 3 of Exhibit A, Statement of Work)**. However, a center may achieve no more than fifty percent (50%) of the monthly Direct Job Placement goal in the Universal placement category and no more than twenty-

five percent (25%) in the WIOA/Dislocated Worker placement category. All placements entered in a given month that exceed the maximum number in one of the above mentioned categories will be counted for performance measures only and NOT for payment.

2. The remaining WIOA categories: Disabled, Veterans, Ex-Offenders, Homeless, REA, CAP and SNAP have no monthly performance restrictions. Providers are encouraged to employ as many jobseekers as possible in those categories.

E. Carryover Performance Payment

If the Contractor does not earn the full Job Placement Base dollar amount per month, as set forth herein and in the **Payment Provision Table (Attachment 1-Part A)**; the unearned portion of the monthly Job Placement Base funding is subject to de-obligation by the SFWIB, at the sole discretion of the SFWIB.

These unearned funds shall become available as carryover for the following month to a Contractor if the Contractor earns at least the minimum number of placements to carry over unearned dollars as set forth herein, and in **Payment Provision Table (Attachment 1-Part A)**, (data must be entered in EMD/EM by the **last day** of the month in order to be eligible for this funding). The Contractor shall invoice up to the new monthly maximum for that month (Base + Carryover). A contractor may **NOT** move or share placements with another center for any reason. Any movement or sharing of placements will be considered a breach of contract.

A funding pool will be established from Workforce Service contractors that do not meet the minimum job placements standard. All unearned funds not carried over may, at the discretion of the SFWIB, become available that current month to pay a Workforce Services Contractor(s) who earns in placements over the monthly maximum standard (Pool and Carryover) monies. The Contractor(s), however, must also meet or exceed one hundred percent (100%) of the maximum job placements standard, achieve a DJP rating of thirty-two percent (32%) or greater and achieve the desired number of placements in WIOA Individualized categories as prescribed in the **Payment Provision Table (Attachment 1-Part A)**. All unused funds in the pool will continue to roll over each month until the end of the program year.

F. Incentive Performance Payments

If the Contractor meets or exceeds the monthly maximum placement goal with a DJP rate of thirty-two percent (32%) or greater and achieves the desired number of placements in WIOA Individualized categories as prescribed in the **Payment Provision Table (Attachment 1-Part A)**, but does not exceed its monthly base amount, as per the payment provision table, subject to placement verification, the Contractor is entitled to earn up to the full base amount (not including any carryover). If the SFWIB determines that a provider moved or shared placements for any reason, it will be considered a breach of contract and the center will not be eligible for this incentive. The Contractor will also be subject to a disallowance for any placement deemed to be falsely reported.

If the Contractor meets or exceeds one hundred percent (100%) of the maximum required Job Placement units as set forth herein and in the **Payment Provision Table (Attachment 1-Part A)** by the end of the contract period and has not earned the full dollar amount contracted for Job Placements (Base + Carryover) for the contract period, the Contractor may, at the discretion of SFWIB be awarded five percent (5%) from the unearned total contracted Job Placements dollar amount for the contract period as an incentive performance payment to provide staff incentives. The contractor must have also obtained a thirty-two (32%) percent or greater DJP Rate average for the program year and achieve the desired number of placements in WIOA Individualized categories as prescribed in the **Payment Provision Table (Attachment 1-Part A)**. The Contractor shall be notified within fifteen (15) days of the end of the Contract period of any potential award.

If the Contractor meets or exceeds one hundred percent (100%) of the maximum required Job Placement units as set forth herein and in the **Payment Provision Table (Attachment 1-Part A)** by the end of the

contract period and as a result exceeds the full dollar amount contracted for Job Placements (Base + Carryover) for the contract period, the Contractor may, at the discretion of SFWIB, be awarded an additional five percent (5%) of the total contracted Job Placements dollar amount for the contract period as an incentive performance payment to provide staff incentives. The contractor must have also obtained a thirty-two percent (32%) or greater DJP Rate average for the program year and achieve the desired number of placements in WIOA Individualized categories as prescribed in the **Payment Provision Table (Attachment 1-Part A)**. The Contractor shall be notified within fifteen (15) days of the end of the Contract period of any potential award.

Incentives are contingent upon the availability of funds and SFWIB's determination on awarding incentive and amount

G. Wage Rate Incentive

An incentive payment of an additional \$100.00 shall be paid for each job placement with a wage rate equal to or greater than **\$14.58** per hour. This will apply to all placements of fully registered individuals that fall under one of the WIOA Individualized categories as prescribed in the **Payment Provision Table (Attachment 1-Part A)**. Universal Full-time (FT)/PWE placements with a wage rate equal to or greater than **\$14.58** an hour will earn an additional \$75.00 in payment. Universal Part-time (PT)/Seasonal placements with a wage rate equal to or greater than **\$14.58** an hour will earn an additional \$37.50 in payment. The Contractor will be responsible for providing the documentation to support the pay rate. A contractor may not exceed their monthly maximum (base + carryover).

H. Retention/WIOA Follow-up Incentive

1. For WIOA Participants the second quarter after exit:

An incentive payment of **\$125.00** shall be paid for each WIOA participant that is still employed at any time within the second quarter after exit. The contracted provider must conduct a follow up with the participant, to include verifying wage rate information, and enter the proper follow up code in EMD/EM. Follow up services will be subject to verification.

2. For WIOA Participants the fourth quarter after exit:

An incentive payment of **\$125.00** shall be paid for each WIOA participant that is still employed at any time within the fourth quarter after exit. The Contractor must conduct a follow-up with the participant and provide documented services in EMD/EM. Follow up services will be subject to verification.

** Follow up payment will not count against a Contractor's monthly maximum and will be paid at the end of each quarter.

- **Retention/WIOA Follow-Up Incentive:** As prescribed in the **Payment Provision Table (Attachment 1-Part AA)** not to exceed **\$00.00 (If dollars are allocated)**.

II. Placements Change Requests through the Automated Performance Invoicing Process (APIP) System

The APIP system will automatically generate a provider invoice on the first (1st) calendar day of the following month. The Contractor shall complete the "**Placements Change Requests**" form and submit it to the SFWIB using the APIP system by the fifth (5th) calendar day of the following month if the following occurs:

- If the Contractor needs to add and/or remove placements from the Performance Invoice, the Contractor shall identify these Job Placements and submit them to the SFWIB using the **Placements Change Requests Form on the APIP system**.

Notes:

- Only **one** Job Placement shall count for performance per distinct social security number for the same jobseeker within the period of July 1, 2018 – June 30, 2019.
- Job Placements submitted using the “**Placements Change Requests**” form will only be applied to the Performance Invoice after approval by the SFWIB on the APIP system.
- If a correction is made that occurred in a previous month and the invoice for that month has closed, that change will be applied to the next **open** invoice. Closed invoices will not be modified.
- Late submission of a monthly invoice will be subject to a five percent (5%) penalty of the monthly payment amount earned as set forth in **Article IV, K–Late Invoicing** of the Contract.

III. Financial Consequences**A. Error Rate Policy**

The Contractor’s average QA error rate will be calculated at the end of the third quarter, March 31st. Contractors with an error rate above 3.00% will be assessed as follows:

- A three percent (3.00%) or below average QA Error Rate for all programs reviewed will not have any monies deducted.
- An average QA Error Rate between three point zero one percent (3.01%) and five percent (5.00%) for all programs reviewed, will have one point five percent (1.50%) deducted from accumulated monthly payments through the 3rd quarter of the program year or March 31st.
- An average QA Error Rate between five point zero one percent (5.01%) and eight percent (8.00%) for all programs reviewed, will have one point seven five percent (1.75%) deducted from accumulated monthly payments through the 3rd quarter of the program year or March 31st.
- An average QA Error Rate over eight point zero one percent (8.01%) for all programs reviewed, will have two percent (2.00%) deducted from accumulated monthly payments through the 3rd quarter of the program year or March 31st.

The penalty will be assessed against the April invoice and the unearned funds shall become available through a pool of funds for all Contractors whose average error rates were three percent (3.00%) and below. Contractors achieving lower Average QA Error Rates will receive a greater share of the Error Rate Pool. The Contractor will receive a pro-rated share of the Error Rate Pool calculated based on the difference between the three percent (3.00%) maximum error rate and the actual average error rate, divided by the total combined difference of all Contractors whose average error rates were below three percent (3.00%).

B. CareerSource center and Furniture Maintenance

The Contractor shall maintain an establishment, in accordance with **Article II, Section V-CareerSource Center and Furniture Maintenance** of this Contract.

C. Center Partners

Any provider found to have unapproved occupants in the CareerSource center without the prior written approval of the SFWIB will be in breach of contract and also will incur a five thousand dollar (\$5,000.00) penalty per occurrence.

D. Staffing Requirements

Failure to comply with the requirements set forth in **Article III, Section N-Staffing Requirements** of this Contract, shall result in a financial penalty of **two percent (2%)** of the **Total Contract Amount** every month for each month that the center is understaffed.

IV. “For-Profit” Contractors

The Contractor that is a for-profit organization shall be awarded a maximum of five percent (5%) profit based upon earned Job Placement Payment Rates. Said profit amount shall be calculated and paid in accordance with the specific federal and state laws and regulations applicable to each of the funding streams. The profit amount shall be earned only if the Contractor achieves the monthly minimum Job Placement standard as indicated in the **CSSF Balanced Scorecard Performance Requirement (Attachment 3 of Exhibit A, Statement of Work)** and **CareerSource Florida’s Administrative Policy Number 97, One-Stop Operator Procurement**. Additional information can be found at:

http://www.floridajobs.org/docs/default-source/2017-guidance-papers/adminpol097_onestopprocurement_final_9252017.pdf?sfvrsn=2

V. Invoicing Under Department Children and Families (DCF) and Department of Economic Opportunity (DEO) Funding

When a contracted Provider has contracts as both a Refugee and DEO funded Provider, the SFWIB will adhere to the payment methodologies below. When a job seeker receives services under both DCF and DEO funded programs and the job seeker obtains employment as a result of a direct job referral, the SFWIB will pay the provider for a DJP under the program that originated the job referral. However, if the SFWIB pays a provider for a DJP under the DCF Refugee Entrant Program and the job seeker also received staff services under a DEO funded program, the SFWIB will also pay the provider for an Obtained Placement under the DEO program. Under no circumstances will the SFWIB pay for two DJP, one for DCF and another for DEO, for the same placement.

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Payment Provision Table
Effective Time Period of 11/1/2018 through 6/30/2019

Exhibit D
(Attachment 1)
Part A

Total Contract Amount: North Miami Beach	8 Month Award	Monthly Payment				
		Base	Carry Over	Maximum	Earned	Not Earned
Job Placement Unit Funding	\$780,370	\$97,546.25	\$0	\$97,546	\$103,300	(\$5,754)

Minimum # of Placements to Carry Over Not Earned Dollars: 338

Max Placement: 398

Program	Monthly						Monthly Approved	
	Employment 1st Qtr			Employment >1st Qtr			Performance	Payment
	Performance	Cost Per	Payment	Performance	Cost Per	Payment		
Obtained Employments	271	\$0	\$0	0	\$0	\$0.00	271	\$0
Direct Job Placements								
UP - PT/Temp/Seasonal	0	\$150	\$0	0	\$50	\$0	0	\$0
UP - FT	64	\$300	\$19,200	0	\$200	\$0	64	\$19,200
WIOA Adult/DW	32	\$1,100	\$35,200	0	\$900	\$0	32	\$35,200
Disability	6	\$1,300	\$7,800	0	\$1,100	\$0	6	\$7,800
Veteran Ex Offenders	13	\$1,500	\$19,500	0	\$1,300	\$0	13	\$19,500
RA Claimant or Homeless Person	6	\$1,700	\$10,200	0	\$1,500	\$0	6	\$10,200
TANF / CAP or SNAP	6	\$1,900	\$11,400	0	\$1,700	\$0	6	\$11,400
DJP Subtotals	127		\$103,300	0		\$0	127	\$103,300
OE & DJP Totals	398		\$103,300	0		\$0	398	\$103,300

Training Pay Points				
	Performance	Cost Per	Payment	Payment
Program Completion	0	20%	\$0.00	\$0.00
Credential Attainment	0	30%	\$0.00	\$0.00
Total	0		\$0.00	\$0.00

Wage Rate Incentive				
	Performance	Cost Per	Payment	Payment
Universal DJP - PT / Seasonal >=\$14.58	0	\$37.50	\$0.00	\$0.00
Universal DJP - FT / PWE >=\$14.58	0	\$75.00	\$0.00	\$0.00
WIOA DJP >=\$14.58	0	\$100.00	\$0.00	\$0.00
Total	0		\$0.00	\$0.00

WIOA Second Payment				
	Performance	Cost Per	Payment	Payment
WIOA 2nd Payment for additional WIOA Placement	0	\$750.00	\$0.00	\$0.00
Total	0		\$0.00	\$0.00

OE & DJP & Wage Rate Incentive & Training Milestones & WIOA 2nd Placement	\$103,300.00
Form B - Adjustments for Previously Paid Placement Request Form	\$0.00
Form C - Placement Change Request Form	\$0.00
Adjusted Total	\$103,300.00
Payment	\$103,300.00

Payment Provision Table
Effective Time Period of 11/1/2018 through 6/30/2019

(Attachment 1- Part AA)
Exhibit D
(Page 1 of 1)

Retention/WIOA Follow Up Incentive: North Miami Beach	8 Month Award	Quarterly Payment	
		Earned	Not Earned
Retention/WIOA Follow Up Incentive		\$0	\$0
WIOA Follow-up Incentive			
	Performance	Cost Per	Payment
2nd Quarter Follow-up	0	\$125.00	\$0.00
4th Quarter Follow-up	0	\$125.00	\$0.00
Total	0		\$0.00
Payment			\$0.00

**WORKFORCE SERVICES
REPORTING REQUIREMENTS
(NOVEMBER 1, 2018 THROUGH JUNE 30, 2019)**

Report Description	Due Date	Submit to:
Self-Assessment Questionnaire	Not later than 30 calendar days after contract execution.	Office of Continuous Improvement (OCI)
Indirect Cost Rate	The lesser of thirty (30) days of Contract execution or along with the program budget	Finance
Cost Allocation Plan	The lesser of thirty (30) days of Contract execution or along with the program budget	Finance
Background Screening Affirmation/Acknowledgement Form	Within thirty (30) days of Contract execution	Quality Assurance
Procurement Requests	Not later than 60 days prior to Contract termination	Contract Manager
Inventory Report	As set forth in written instructions from the SFWIB	Administration
Annual ETA Salary Cap Analysis Certification Form	March 1, 2019	Finance
Limited English Proficiency (LEP) Survey	April 19, 2019	Adult Programs Supervisor: One (1) Original
INTRANET REQUIRED REPORTS		
Staffing Roster/New Hire/Termination Report (Attachment 1)	10 th of each month	Adult Programs
Supervisory Quality Assurance Case Reviews (Download from: http://intranet:18112/sites/intranet/requiredReports)	10 th of each month	OCI Quality Assurance Staff
Disability Coordinator's Monthly Report (Attachment 2)	5 th of each month	ADA Coordinator
Employment Service Complaint –System Log (Attachment 3)	10 th of each month	Adult Programs
Log Of Apparent Violations - MSFW (Attachment 4)	10 th of each month	Adult Programs
Veteran Quarterly Manager's Report (Attachment 5)	5 th of the first month of each quarter	Adult Programs – DEO
Monthly Training Report (Attachment 6)	10 th of each month	Training Coordinator

DISABILITY COORDINATOR'S MONTHLY REPORT	
Name:	Reporting Period:
Career Center/Refugee Center:	
E-mail address:	Phone:
Disability Coordinator's Position Title:	
Please make your responses to the following questions as comprehensive and specific as possible. For example, it is not sufficient to say you are working with youth; please provide examples with impact and outcomes.	
A. Please answer the 3 questions below by providing information on any activities you engaged in to provide meaningful and effective physical, programmatic and communication access in your Center for people with disabilities.	
A.1 What activities have you engaged in to increase employment and self-sufficiency of Social Security beneficiaries and others with disabilities?	
A.2 What activities have you engaged in to facilitate seamless and comprehensive services and access to programs and services in Center for people with disabilities? (Barrier removal, problem solving, accommodation issues, technological access challenges, etc.)	
A.3 What activities have you conducted that involved access, accommodations, and/or education or training, which helped to lead a job seeker with a disability in gaining employment or having access to a program or service. (Success story)	

**DISABILITY COORDINATOR'S
MONTHLY REPORT**

B. List activities you have been involved in to develop new and maintain on-going partnerships that achieve a seamless, integrated workforce system. Please address the linkages and building relationships with the following: (1) Social Security Administration's Work Incentives Planning and Assistance Program, (2) the Ticket to Work Program and Employment Networks (EN), and (3) with Vocational Rehabilitation.

B.1 Please provide one example of how you enhanced the collaborative relationship between the WIPA program and your Center. (Examples: refer disability recipients to the WIPA Benefits Specialist, invite the WIPA Benefits Specialist to do a presentation to staff at your Center.)

B.2 Please provide one example of how you enhanced the collaborative relationship between the local area ENs (under the Ticket To Work program) and your Center. (Examples: refer disability recipients to an EN, invite an EN to do a presentation to staff at your Center.)

B.3 Please provide one example of how you enhanced the collaborative relationship between the Vocational Rehabilitation program and your Center. (Examples: refer people with a disability to VR, invite VR to do a presentation to staff at your Center.)

B.3.1 Systems Relationships:
Please indicate by checking, whether you referred any customers to these programs or contacted any of the programs regarding their services?

	B.3.1.a Public Housing Agencies	
	B.3.1.b Transportation	
	B.3.1.c Medicaid Buy-In	
	B.3.1.d Medicaid	
	B.3.1.e Medicare	

DISABILITY COORDINATOR'S MONTHLY REPORT	
	B.3.1.f Food Stamps
	B.3.1.g Individual Development Accounts (IDAs)
	B.3.1.h Earned Income Tax Credit (EITC) Coalition
	B.3.1.i Other programs not listed above, please list here:
B.3.2 Please indicate by checking below, efforts you or staff in your Center have made to improve communication with other systems of support for the following groups of job seekers with disabilities.	
	B.3.2.a Transitioning Youth, in- or out-of-school youth with disabilities
	B.3.2.b Prisoner Re-Entry population
	B.3.2.c Senior Community Service Employment Programs
	B.3.2.d Apprenticeship Programs
	B.3.2.e Veterans
	B.3.2.f Temporary Assistance for Needy Families
	B.3.2.g. Local Mental Health agencies
	B.3.2.h. Local Developmental Disabilities agencies
	B.3.2.i. Disability Groups, please list:
	B.3.2.j Other, please list below:
B.4 Establishing linkages to the Business Community to increase Job and Career Opportunities. Please share an example of collaboration activities you were involved in with the business community to build relationships over the reporting period. Indicate the entities involved in the collaboration, explain the nature of the relationship including the types of activities that you worked on together and elaborate on the outcomes that are being achieved as a result of this relationship.	
C. <u>Only complete if you work with Individual Resource Teams or Local Interagency Action Committees that work across workforce and disability systems that address multiple employment needs of job seekers with disabilities:</u>	
Please share an example of individual-level IRT activities that you initiated, coordinated, modeled or participated in with your Center staff that led to an effective blending of services and resources for an individual job seeker with a disability. Indicate all of the partners and resources that you accessed in developing and implementing the process.	
C.1 Local Narrative:	
Please share an example of how your Center has been better able to provide support, services and better employment opportunities and connections to job seekers with disabilities.	

Veteran Quarterly Manager's Report (VPL 01-10)
Due Date: 5th of the Month Following the End of the Quarter
Please Submit a Single Report for Each Region Workforce Board

Quarter Reported	Choose an item.
Date of Report:	
RWB No 23	RWB Name CareerSource South Florida
Report Submitted By:(name/email/#)	

Numbers apply to Veterans and Eligible persons in the reported Quarter	<u>DVOP</u>	<u>LVER</u>	<u>Non Vet Staff</u>
Total served by:			
Served with a Significant Barrier to Employment (SBE)¹:			
Referred to Employment:			
Entered/Obtained Employment 750 to 879, 880, 881, 882, 883²			
Number of Intensive Services Provided:[*]			
*Intensive Service Codes: 200, 201, 202, 203, 204, 205, 212, 215, 226			
Homeless Shelters/HVRP Grantees visited			
Referred to Training, (Include WIA):			
Placed in WIOA Program:			
Services Provided to Non-Vets:			
Job Developments E33 LVER 123 DVOP:			

¹ In Accordance with VPL 03-14 and 04-14, (FY) 2015: 75%, (FY) 2016: 90% of veterans and eligible spouses served by DVOP will receive intensive services.

² Need to De-Duplicate Employed Codes

LVER Specific			
Employer Contacts:		E01-E05, E07, E09-E13, E15-E25, E27-E34, E38-E43, E46, E50	
Employer Onsite Visits:		E01, E09, E12, E13, E50	
Federal Contractor Contacts:		E01-E05, E07, E09-E13, E15-E25, E27-E34, E38-E43, E46, E50	
Federal Contractor Onsite Visits:		E01, E09, E12, E13, E50	
Capture numbers for LVER as follows: Seminars: , Job Search Workshops: , Job Search Groups: , Job/Career Fairs: Seminars: 0, Job Search Workshops: 0, Job Search Groups: 0, Job Fairs: 0			
Results of employer contact/visits: Job Orders received, Total number of openings created: Job Orders— , Total Openings—			
Training/Seminars			
List Training or Seminars Provided by LVERs to Staff or Employers this quarter, including coordinating with unions, apprenticeship programs and businesses or business organizations to promote and secure employment and training programs for veterans:			
<ol style="list-style-type: none"> 1. LVER provided CSSF center Staff training on Priority of Service to Veterans 2. LVER meet with several local employers and providing presentations on the services that are offered by CSSFL 			
Chapter 31 Veterans			
	<u>DVOP</u>	<u>LVER</u>	<u>CareerSource Staff</u>
Chapter 31 Veterans Assigned:			
Chapter 31 Veterans Entered in Case Management:			
Chapter 31 Veterans Placed in Suitable Employment:			
Chapter 31 Veteran's Case Files over 18 Months:			
Priority of Service			
How does the RWB ensure that veterans and covered persons take precedence over eligible non-veterans and eligible persons in obtaining services?			
Please address any problems with "Priority of Service" in the RWB during the reported quarter? No Problems			

Success Stories	
We are looking for stories that are "Above and Beyond", be sure to include lessons learned that might save time, get Veterans Hired, or help the TEAM (In Accordance with DVOP/LVER Roles and Responsibilities).	
Best Practices	
These are improvements or special projects.	
DVOP/LVER Comments/Suggestions	
Please provide Ideas you think would improve the Program.	
CareerSource Center Director's/Program Director's Comments:	
Comments: (This should be the person with oversight of the Veterans's Program, included Name and Contact Information)	
CareerSource Executive Director's Comments:	
Comments:	
DEO Veterans' Program Coordinator's Comments:	
Comments:	
U.S. DOL VETS Comments:	
Comments:	

¹ Quick Glossary HVRP Specific RWB's: RWB 15, Hillsborough County, Tampa/RWB 24, Volunteers of America, Miami/RWB 2, Female & Families, Fort Walton Bch/RWB 8, City of Jacksonville, Jacksonville/RWB 21, Faith Hope Love Charity Inc, Palm Springs

VETERAN GROUPS DEFINITIONS ACROSS DOL PROGRAMS

Source	Veteran	Eligible Person/Spouse	Recently Separated Veteran
DVOP/LVER	38 U.S.C. 4211(4)	38 U.S.C. 4101(5)	38 USC 4211(6)
WIA	29 U.S.C. 2801(49)(A)	N/A	29 USC 2801 (49) (B)
HVRP	38 USC 101 (2)	N/A Not Identified	29 USC 2801 (49) (B)
Priority of Service	38 U.S.C. 101(2)	38 U.S.C. 4215(a)(1)(B)	N/A Not Identified
Significant Barriers to Employment (SBE)	VPL 03-14 and 04-14		

DEFINITIONS

Able-Bodied Adults Without Dependents (ABAWD): An ABAWD is a person between the ages of 18 and 49 who has no dependents and is not disabled.

Access Points: Volunteer Community Organizations providing access to employment and training services. Access Points have staff trained by the workforce system to help customers search for jobs using web-based job matching and making appropriate referrals to CareerSource centers. Access Points work closely with CareerSource centers to ensure customers receive a full range of services they need to be job ready. Access Points do not receive Career Center funding to provide access point services.

Administrative Costs: Costs that are associated with the overall management and administration of the program and are not related to the provisions of services to participants.

Administrative Entity: The South Florida Workforce Investment Board (SFWIB).

Adult Programs: Workforce Innovation and Opportunity Act (WIOA) Adult, WIOA Dislocated Worker, Wagner Peysner (WP), Supplemental Nutrition Assistance Program Employment and Training (SNAP E&T), Career Advancement Program (CAP), Re-employment Assistance (RA) formerly Unemployment Compensation, Reemployment Services and Eligibility Assessment Program (RESEA), (UC) claimants, Veterans and Refugee Employment and Training are the Adult Programs for the SFWIB.

Allowable Costs: Costs which are necessary, reasonable and allowable under applicable Federal, state and local law for the proper administration and performance of the services to be provided under this Contract. The Contractor payments or reimbursements under this Contract are for allowable costs only.

Alternative Responsibility Plan (ARP): Outlines the steps to self-sufficiency for individuals that are temporarily deferred from mandatory work requirements in the Welfare Transition (WT)/Career Advancement Program (CAP).

Amendment: See Modification.

Appropriate/Authorized Signatory: The appropriate/authorized signatory for the business shall be either the owner where the business is incorporated; a partner where the business is a partnership; or an officer if the business is a corporation.

APIP: Automated Performance Invoicing Process.

Agricultural Services Program: The Agricultural Services program is an outreach and employment program for migrant and seasonal farm workers.

Assessment: The process whereby individuals are interviewed and/or tested to determine their employability, motivation, aptitude, abilities and interests in order to develop a career plan for the attainment of the individual's career goals. Testing and counseling are a part of the assessment process. Additional assessments as needed for proper service and referral of customers as described herein may also be provided.

ATLAS (Automated Tracking, Linking and Archiving Solution) Kiosk: An electronic data management system which supports programs and manages all in Center traffic and participant records.

Audit: A systematic review by a CPA or other duly certified and licensed individual or organization to determine and report whether Contractor's financial operations are being properly conducted, financial reports are being presented fairly and applicable laws and regulations are being complied with.

Background Screening: Search of an individual's criminal records. A background check may include the search of driving records, former employer references, and character references. Background screenings shall comply with all applicable federal, state and/or local laws, regulations and ordinances regarding background screening of employees, volunteers and subcontracted personnel.

Basic Career Services: Services that are made available to all jobseekers.

Basic Skills Deficient: An individual who scores at or below the 9th grade level on an appropriate standardized test in either English reading or computation skills.

Business Day: A regular workday, Monday through Friday, from 8:00 a.m. to 5:00 p.m. local time in Miami, Florida other than Saturday, Sunday, or a holiday recognized by the SFWIB.

Business Services: The purpose of the Region's Business Services is to provide various services to businesses as its primary focus. This approach helps ensure that market demand is connected with labor supply and provides specific services to the region's business community beyond the traditional placement services.

Career Advancement Program (CAP): Local reference for Welfare Transition Program.

Career Advisement: A collaborative process that assesses, plans, implements, coordinates, monitors, and evaluates the options and services required to meet an individual career goal(s). This activity carefully and fully documents all activities related to participant's contact and progress.

CareerSource centers: Florida's One-Stop centers. The cornerstone of the workforce system, a center that delivers unified training, education, and employment programs and services into a single, customer-friendly system within each community.

Code of Federal Regulations (CFR): A codification of general and permanent rules/regulations that have been compiled by the Office of the Federal Register and is divided into fifty (50) titles, which cover broad areas subject to Federal regulation.

Co-Enrollment: The state of being a participant in two or more programs at the same time.

Commercial Organization: A private for profit entity.

Computer: An internally programmed, automatic device that performs data processing. "Computer" refers to the desktop and laptop computers that most people use. When referring to a desktop model, the term "computer" as used herein refers to the motherboard, CPU, memory (or RAM), hard drive, video card, monitor, keyboard, mouse, and all other components attached and/or contained within the case.

Computing Devices: Machines used to acquire, store, analyze, process, and publish data and other information electronically, including accessories (or "peripherals") for printing, transmitting and receiving, or storing electronic information (2 CFR Part 200.20).

Community Service (CS): The practice of allowing participants to gain or improve employability skills through useful community purpose in the areas of health, social service, environmental protection education, urban & rural development, recreation, public facilities, public safety and childcare as part of the Welfare Transition (WT)/Career Advancement Program (CAP).

Contractor: The organization that enters into a contract with the SFWIB.

Cost Allocation Plan: A plan, which identifies and distributes the cost of services provided by support staff and/or departments or functions. It is the means to substantiate and support how the costs of a program are charged to a particular cost category.

Exhibit F

Customized Training (CT): Training designed to meet the special requirements of an employer or a group of employers, conducted with a commitment by the employer(s) to employ, or continue to employ, an individual upon successful completion of the training, and the employer pays a percentage (as set forth in the SFWIB's Policy for CT) of the cost of the training.

Customer Relationship Management (CRM): A strategy for managing an organization's relationships and interactions with customers and potential customers.

Data: A representation of information, knowledge, facts, concepts, computer software, computer programs, or instructions. Data may be in any form, in storage media or stored in the memory of the computer or in transit or presented on a display device.

Data in Transit: Data being transferred via the following, but not limited to, networks (e.g. the Internet), mobile telephones, wireless microphones, wireless intercom systems, Bluetooth devices, etc.

Data Storage: The act of saving electronic, audio/visual, oral, and written information to an electronic or conventional location for archival purposes.

Data Transmission: The act of sending electronic, audio/visual, oral, and written information to a specified location(s).

Department of Children and Families (DCF): The Florida state agency that provides various social services to assist groups including the following: Children, Adults, Refugees, the Homeless, Disabled individuals, the Elderly and Domestic Violence/Human Trafficking Victims.

Department of Economic Opportunity (DEO): The Florida State agency that administers funds and programs from the U. S. Department of Labor and Health and Human Services.

Direct Job Placement (DJP): The Contractor recruits the employer and facilitates the hiring of the customers as a result of a referral through a job order listing the opening as a full-time unsubsidized employment. For payment a DJP is referred to as Direct Employment.

Disability Coordinator/Disability Navigator: The assigned staff is responsible for ensuring that the Career Center provides seamless and comprehensive services to persons with disabilities; increasing employment and self-sufficiency for Social Security beneficiaries and others with disabilities; facilitating access to programs and services to individuals with disabilities; and facilitating linkage to the employer community.

DUNS: "Data Universal Numbering System (DUNS) number", means the 9-digit number assigned by Dun and Bradstreet, Inc. (D&B) to identify unique business entities, which is used as the identification number for Federal Contractors.

Early Learning Coalition (ELC): Former School Readiness Coalition. Florida's early learning coalitions are tasked by the legislature to administer state and federal early education programs, and to comply with high standards for child safety and program content.

Electronic Data Systems: See Information Technology Systems.

Eligible or Eligibility: These terms refer to an individual's or business' status in relation to their ability to meet established criteria in order to receive services under the WIOA, TANF or any SFWIB funded program.

Employ Miami-Dade (EMD)/Employ Monroe (EM): Formerly Employ Florida (EF). EMD/EM is a powerful on-line labor exchange tool which connects employers to jobseekers while providing access to workforce tools, resources and local workforce experts. The site offers job listings posted by CareerSource centers or

employment providers and also uses “spidering” technology to capture openings from recruiting pages of company websites throughout the state.

Employed Worker Training (EWT): Training for an employer for its current staff in order to improve the quality of its workforce through enhanced skills attainment, productivity and competitiveness. The employer may be reimbursed a percentage (as set forth in the SFWIB’s Policy for EWT) of the total training cost for workers that successfully complete training.

Employability Skills Training: Employment services delivered to an unemployed or underemployed eligible customer with the objective of removing barriers to employment and obtaining employment to promote economic sufficiency. These services may include resume writing, interviewing skills, telephone techniques, and job acquisition skills.

Employer Services: The provision of Career Center services to employers as a primary customer.

Employment Verification: A form signed by an employer and program participants that verifies the date of employment, average work hours and rate of pay.

Entrepreneurial and Self-Employment Training (ESET): A combination of assessment, training, and additional technical assistance, delivered through a network of strategic partners. This method of study provides training and assistance in a more systemic and strategic manner by providing the specific skills and knowledge necessary to plan, finance, start, and/or expand a business. Such training should be outcome-oriented, focused on a long-term goal, coincide with the applicable exit strategy, and result in credential attainment. This is another way the region can leverage its resources to support unemployed and underemployed workers and create jobs.

Exit: Determined to be as follows: a participant who has a date of case closure, completion or known exit from WIOA funded or non-WIOA funded partner services within the quarter (hard exit) or a participant who does not receive any WIOA funded or non-WIOA funded partners service for ninety days and is not scheduled for future services except follow-up services (soft exit). The separation of a participant exiting the WIOA programs, which can either, be a positive or negative exit. This individual is no longer receiving employment, training or services funded under WIOA.

Facility Costs: Costs defined as Alarm Monitoring, Common Area Maintenance, Copiers, Electricity, Equipment Maintenance, Data Lines, File Storage, Fire Extinguisher, Janitorial, Insurance, License/Registration, Moving Expense, Parking Fees, Telephone, Pest Control, Plants, Postage Machines, Security Guard, Space Rental, Trash Pick-up, and Water/Sewer.

Federal Bonding Program: The Federal Bonding program is an incentive program that allows employers to hire at-risk job applicants with limited liability to their business.

Follow-Up Services: Services provided for a minimum of twelve (12) months following the first day of employment or termination from a specific program to ensure job retention, wage gains, career progress, assess service needs, and/or re-engage into a specific program.

Full-Time Employment: Year-round, unsubsidized employment or self-employment of thirty (30) or more hours per week.

High Demand Driven Occupations: An occupational area, which has been designated and published by the State as being in high demand in the Miami-Dade or Monroe County labor market area. Educational Scholarships may be awarded for high demand occupations only.

Homeless Person (HP): A Homeless Person refers to an eligible WIOA Adult that is identified in EMD/EM as meeting the United States Department of Housing and Urban Development’s definition of a Chronically

Homeless Person at the time of registration and secures a DJP with the WP referral create date being on or after the WIOA eligibility/enrollment date and with the hire date not on the same date of the referral create date and/or the WIOA eligibility/enrollment date. The WP DJP result date must be recorded in EMD/EM WIOA and occur within six months of the WIOA application date.

Income: Total family earnings for the last six (6) months, exclusive of re-employment assistance (formerly unemployment compensation), child support payments, and old-age and survivors' benefits received under Section 202 of the Social Security Act (42 U.S. C. 402).

Indirect Cost Proposal: Documentation prepared by an organization to substantiate its claim for the reimbursement of indirect costs. This proposal provides the basis for the review and negotiation leading to the establishment of an organization's indirect cost rate.

Indirect Cost Rate: An indirect cost rate is a percentage (indirect cost pool/direct cost base) used to distribute indirect costs to all cost centers benefiting from those costs.

Individualized Responsibility Plan (IRP)/Individual Employment Plan (IEP)/Career Plan (CP): A contract between the career advisor and the participants detailing a systematic process of setting an employment goal and accomplishing the goals which will lead the participants to economic self-sufficiency. It also includes the appropriate combination of services determined during the individual's assessment.

Individualized Career Services: Services provided to a jobseeker upon the determination that they are necessary for the jobseeker to obtain or retain employment.

Individualized Training Accounts (ITA): The funding that provides monies used to pay for the training services of eligible participants. These vouchers are used to pay for a participant's enrollment in an approved training program.

Information Systems: See Information Technology Systems.

Information Technology Systems: Computing devices, ancillary equipment, software, firmware, and similar procedures, services (including support services), and related resources (2 CFR Part 200.58).

Initial Assessment Application (IAA): An on-line application to track participant services provided by the SFWIB Contractors at all locations.

Intake: Eligibility determination, initial data collection, and pre-employment or work adjustment counseling services, including orientation, work activities, employment preparation for WIOA Adult and Dislocated Adults and CAP or TANF program customers.

Job Order: A job order is a structured record of an employer's requirement for filling vacant positions with qualified workers. Before a job order can be constructed, there must be a job opening available. All job orders must comply with federal and state laws, as well as the terms of use policy of EMD/EM.

Job Participation Rate (JPR): The rate at which a participant is required to participate in a job related activity to meet the requirements of a given program. Said activities may include job searching, employment training or work experience. Job Participation Rate hours are documented in the participant's case file and recorded in the One-Stop Service Tracking (OSST) System.

Job Placement: When an unemployed or underemployed eligible customer begins to work in unsubsidized employment as a DJP or OE.

Job Retention: The number of consecutive days a program participant has retained employment following placement. The period of required retention is determined in accordance with the specific program and may

depend upon the activity into which a customer is enrolled or some other predetermined length of time as established by the SFWIB.

Job Search Training: Training including job club, which provides the customers with the instruction and skills necessary to actively seek employment.

Jobseeker: Individual who is unemployed or underemployed and in need of services to achieve employment that will assist him/her to become self-sufficient.

Job Skills Training: Training directly related to employment in a specific occupation for which there is a written commitment by the employer to offer employment to participants who successfully complete the training and demonstrate proficiency in standard skills that are required for all employees by the employer. Job Skills Training is synonymous with customized training.

Mandated Partners: Required state and federal entities that carry out activities or programs as defined under WIOA, Section 121 (b)(1)(B).

Management Information System (MIS): "MIS" refers to a computer-based system designed to store, transmit, and process client data to support the activities of the program and to provide managers with the tools for organizing, evaluating and efficiently run the program (i.e. EMD/EM, OSST, WFMS, etc.).

Migrant and Seasonal Farm Worker Outreach Specialists: The Agricultural Services Program is an outreach and employment program for migrant and seasonal farm workers.

Military Family Employment Advocate: The Military Family Employment Advocacy Program delivers priority workforce services for eligible military family members in the State of Florida. Military Family Employment Advocates are located in CareerSource centers near military bases and communities with a large population of military families. Military spouses may also be eligible to receive training and other supportive services under the Workforce Innovation and Opportunity Act. Persons eligible for assistance through this program include spouses and dependents of: Active duty military personnel, Florida National Guard members and Military reservists whose units are activated.

Modification: A letter or formal modification/amendment executed by both Parties which provides for a change to the terms and conditions of this Contract or to the services to be provided under this Contract.

National Emergency Reserve (NER): WIOA Adult/National Emergency Reserve (NER) will provide WIOA Adult employment and training services/activities following the WIOA Adult Program policies and procedures.

Obtained Employment (OE): A Wagner-Peyser (WP) Obtained employment (OE) refers to those individuals who secure employment within 180 calendar days of receiving one or more services which are wholly or partially funded by the state employment service agency, but the placement does not meet the federal definition for a "WP Placement." Credit for an OE may be claimed for any participant who has received any WP reportable service(s), and has a job start date, where both service and start date fall within 180 days from the date the obtained employment is recorded. Staff must verify that the customer has started working prior to taking credit for an obtained employment. Notification of a hire date will not suffice for securing OE credit.

Occupational Skills Training: Program of study provided to an individual to enhance employability in an occupation or to improve his/her ability to carry out a present or future occupation.

One Community One Goal (OCOG): One Community One Goal is the long-term economic development strategic plan for Miami-Dade County. It integrates a broad spectrum of Miami-Dade organizations, programs and businesses that work together to advance the goal of a thriving, inclusive and diverse community.

On-the-Job Training (OJT): Paid full-time employment in which the employer provides training to a participant in order for the participants to learn the skills necessary to perform the job.

One-Stop Service Tracking (OSST): The One-Stop Service Tracking system (OSST) is the case tracking system for the CAP and SNAP programs to track case management activities and to provide data for state and federal level reporting.

Outreach: An effort by individuals in an organization or group to engage, connect ideas, or practices to the efforts of other organizations, groups, specific audiences, the general public, or programs.

Paid Work Experience (PWE): A work-incentivized program designed to assist job seekers in obtaining needed job-related training. The program focuses on skills development for in demand occupations, at no cost to the employer.

Part-Time Employment: Year-round unsubsidized employment of less than thirty (30) hours per week.

Participant: An individual that has been determined eligible to participate in and who is receiving services from a program covered by this Contract.

PELL Grant: Popular name for the federal PELL Grant program whose primary objective is to provide funding to financially needy postsecondary and undergraduate to meet educational expenses.

Performance Fixed Rate: A method of payment used when payment for a Job Placement is based upon a Service Unit fee for Job Placement Units completely delivered to a jobseeker.

Performance Improvement Plan (PIP): A formulated plan that details the steps to improve performance set forth by the SFWIB that will remain in place until the deficiency (ies) is/are corrected.

Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA): Public Law 104-193: Federal Law that went into effect in October of 1996 which eliminated the open-ended federal entitlement program, Aid to Families with Dependent Children (AFDC), and replaced it with the Temporary Assistance for Needy Families (TANF) block grant. The TANF legislation changed the nation's welfare system from the receipt of cash assistance as an entitlement to one that requires work in exchange for time-limited financial assistance.

Priority of Service to Veterans: Provisions taken to ensure veterans and covered persons are provided employment and training services within the integrated employment service and one-stop delivery system.

Professional Placement Network (PPN): A service offered at the CareerSource centers that links Professionals with potential employers.

Profit: An amount in excess of the cost necessary to operate a program. Profit is allowable to the extent it is reasonable as determined during contract negotiations, and if it is allowable under the funding stream. It includes that amount which is associated with proprietary materials included in the cost of the program. Profit may only be earned by private for-profit organizations.

Program: Activities and services to be provided by the Contractor under and pursuant to this Contract.

Program Cost: The Contractor's cost to deliver the contracted services excluding administrative costs. Costs associated with the management of the program funded by this Contract that directly and immediately benefit program customers and are necessary for effective delivery of services.

Program Design and Service Delivery: Describes the work to be performed by all Contractor's under the terms and conditions of this Contract.

Program Income: Interest earned on any advances under this Contract, income generated as a result of use or fees charged for the rental of real or personal property, fees for services performed, conferences, the sale of commodities or items developed with contract funds, or from the participants activities under the contract except for OJT, or revenue in excess of costs earned by organizations other than commercial organizations (20 CFR 667.200(a)(6)).

Program Year: The period between July 1 of a calendar year and June 30 of the following calendar year.

PRWORA: See Personal Responsibility and Work Opportunity Reconciliation Act for definition.

Rapid Response: An activity provided by the local workforce board, with funds provided by the State under WIOA, Section 134(a) (1) (A), in the case of a permanent closure or mass layoff at a plant, facility, or enterprise, or a natural or other disaster, that results in mass job dislocation, in order to assist dislocated workers in obtaining reemployment as soon as possible.

Rapid Response Supplement: Rapid Response Supplement is to address rising unemployment rates and increased demands for assistance and training following the WIOA Dislocated Workers policies and procedures.

Re-employment and Eligibility Assessment (REA): Formerly a U. S. Department of Labor funded pilot project that provided assessment and labor market information and job search assistance to selected UC Claimants.

Re-employment Assistance (RA) Program: Formerly the Unemployment Insurance benefit that provides temporary wage replacement for individuals who have lost their jobs through no fault of their own. The new name of the program emphasizes the job search activities and reemployment services offered by Florida's workforce partners to jobless claimants receiving benefits.

Re-employment Services and Eligibility Assessment (RESEA): A program funded by the U.S. Department of Labor to help Unemployment Insurance claimants return to work faster. Permanently separated claimants are required to participate in the RESEA program.

The Reemployment Services and Eligibility Assessment (RESEA) Referral: To direct an individual or program participant to another contractor, community based organization or agency or other community resources to receive services, information or assistance.

Scholarship: Formerly ITA. Scholarship is training provided and directly linked to an occupation in demand in the local area utilizing "eligible providers of training services" which maximizes consumer choice in the selection of an eligible provider. A scholarship can be used for payments of tuition and training related expenses up to the local established maximum.

Seasonal Employment: Employment 150 days or less which is temporary due to the nature of the work, like harvesting, or due to annual cycles in the labor market, like Christmas season retail sales.

Self-sufficiency: The minimum amount of cash resources needed in order for a family to meet its basic needs and become self-sufficient.

Service Partners (SP): Contractors.

SNAP: See Supplemental Nutrition Assistance Program.

South Florida Workforce Investment Board (SFWIB): In March of 2006, the Miami-Dade County Board of County Commissioners adopted Resolution R-315-06, which approved an Inter-local Agreement between the two chief elected officials of Miami-Dade and Monroe counties. The approval of this Inter-local Agreement, created the SFWIB and its current administrative structure.

Statement of Work (SOW): Describes the work to be performed by the Contractor under the terms and conditions of this Contract.

Storage device: A computer storage device is any type of device or hardware that is capable of storing data and includes, but is not limited to laptops, hard drives, external hard drives that connect via Firewire and USB, disks, Flash memory devices, such as USB keychain drives or iPod nanos, MP3 players, digital cameras, compact flash and SD cards, tape drives, personal digital assistants (PDA's), smart phones, etc.

Subsidized Employment: Private sector, for profit or not-for-profit enterprise, or public sector employment that is directly supplemented by federal or state funds. A subsidy may be provided in the form of work supplementation, on-the-job training, incentive payments, tax credits and training bonuses.

Supplemental Nutrition Assistance Program (SNAP): Formerly known as the Food Stamp Employment and Training Program, (FSET). This program emphasizes work, self-sufficiency, and personal responsibility. The program strives to meet the needs of participants in gaining skills, training, work, and experience that will increase the program participants' ability to obtain total self-sufficiency. The state of Florida provides SNAP services to able-bodied adults (ages 18 - 49) without dependents (children) (ABAWDS).

Support Service: Services, such as transportation, childcare, housing assistance that are necessary to enable an individual to participate in program activities.

TABE (Test of Adult Basic Education): An adult basic skills assessment test that is designed to assess reading, mathematics, language, and spelling skills.

Target Population: Groups of actual and potential users appropriate to a funding stream as the recipient of a specific service(s) or as the primary users of a specific Career Center. The target population may be the population to be served by the Career Center, a specific group within that population, or some other group that the SFWIB is aiming to serve.

Temporary Assistance for Needy Families (TANF): The October 1996 PRWORA eliminated the open-ended federal entitlement program, Aid to Families with Dependent Children (AFDC), and replaced it with the Temporary Assistance for Needy Families (TANF) block grant. The TANF legislation changed the nation's welfare system from the receipt of cash assistance as an entitlement to one that requires work in exchange for time-limited financial assistance.

Temporary Employment: Employment 150 days or less which is temporary due to the nature of the work, like harvesting, or due to annual cycles in the labor market, like Christmas season retail sales.

Trade Adjustment Assistance (TAA): Federally funded program that assists workers who are totally or partially separated or may become separated from employment as a result of imports.

Training Services: Occupational skills training, provided through a scholarship, on-the-job-training, or customized training programs that combine workplace training and related instruction, skill upgrading and retraining entrepreneurial training, job readiness training, and adult education and literacy activities provided in combination with other training services.

Transitional Jobs (TJ): A new type of work-based training that is allowed under WIOA. Transitional jobs are time-limited work experiences that are subsidized, combined with comprehensive career and supportive services and in the public, private or nonprofit sectors for individuals with barriers to employment, who are chronically unemployed or have an inconsistent work history.

Unemployment Compensation (UC): The UC program was renamed the Re-employment Assistance Program by House Bill 7027 passed during the 2012 Legislative Session which was signed into law by Governor Rick Scott on March 28, 2012.

Universal Access: An entitlement to a basic level of service that can be provided with minimal staff assistance by a Career Center located in Miami-Dade or Monroe County.

Unsubsidized Employment: Full-time employment of thirty (30) or more hours or part-time employment of less than thirty (30) hours per week not directly supplemented by federal or state funds. Paid apprenticeship and cooperative education are included in this activity. (In SNAP, full-time is thirty (30) hours a week or more and part-time is 29 hours a week or less.)

Veteran: For the purposes of implementing priority of service, the Final Rule published on December 19, 2008 at 73 Fed. Reg. 78132 of the "Jobs for Veterans Act" Public Law 107-288 (38 USC 4215) requires that program operators use the broad definition of veteran found in 38 U.S.C. 101(2). Under this definition, the term "veteran" means a person who served at least one day in the active military, naval, or air service, and who was discharged or released under conditions other than dishonorable, as specified in 38 U.S.C. 101(2).

Veterans Program: Veterans' Program services are fully integrated into the Career Center with services to veterans considered a total Career Center responsibility and not only the domain of the Disabled Veterans' Outreach Program (DVOP) and Local Veterans' Employment Representative (LVER) staff.

Wagner Peyser (WP): The Wagner-Peyser Act of June 6, 1933, as amended under WIOA. A federally funded labor exchange program developed to match employers with qualified out of work individuals. It is linked to the Re-employment Assistance program, helping applicants filing for Re-employment Assistance benefits to find new employment opportunities.

Welfare Transition (WT): See the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) (Locally referred to as Career Advancement Program or CAP).

WIOA Adult: An individual who is eighteen (18) years or older and is economically disadvantaged as defined by the SFWIB.

WIOA Dislocated Worker: An individual who (1) has been terminated or laid off or who has received notice of layoff or termination; is eligible for or has exhausted Re-employment Assistance and is unlikely to return to his/her previous industry or occupation; (2) has been terminated or laid off or who has received notice of layoff or termination; insufficient earnings, or the employer is not covered under UC law and is unlikely to return; (3) plant closure or substantial layoff; (4) is employed at a facility where the employer has made a general announcement that the facility will close within one-hundred eighty days; (5) was self-employed but is unemployed as a result of general economic conditions; (6) Displaced Homemaker; (7) active service member's spouse who lost employment due to relocation; and (8) active service member's spouse who is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.

WIOA Registration: Certifying and documenting the WIOA eligibility and priority of service of the individual served. It is also the point of service delivery where performance measurement begins and the individual begins receiving WIOA funded services.

Work Experience: Planned, structured learning experiences that take place in a workplace for a limited period of time; Work experience workplaces may be in private, for-profit, non-profit or the public sectors.

Work Maturity Skills: Skills required to meet employer expectations for dependability and productivity that are essential to enable a young adult to keep a job once he or she gets hired, including, but not limited to the following: attendance, punctuality, positive attitude/behavior, appearance, interpersonal relations and task completion.

Workforce Innovation and Opportunity Act (WIOA): Legislation that laid the framework for delivery of workforce services at the state and local level to jobseekers who need the services. WIOA is designed to help

Exhibit F

jobseekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy.

Workforce Management System (WFMS): The system for tracking participant's training related information, i.e., expenditures and performance data, and that enables career advisors to create, modify and track budget accounts and expenditures for participants receiving support services.

FINANCIAL CLOSEOUT PROCEDURES

I. Purpose

The purpose of this procedure is to document and provide guidance to Contractors and the South Florida Workforce Investment Board's (SFWIB) staff on the required process to close out contracts at the expiration or termination date.

II. Policy

- A. Contractors shall complete and submit a Financial Closeout for each contract on or before thirty (30) calendar days after the contract expires, or upon termination of the contract. For example, if the contract expires June 30, the Financial Closeout will be due to the SFWIB on or before July 30.
- B. If the Contractor's Final Expenditure Report indicates that payments were made to the Contractor in excess of the actual costs of providing contracted services or if the actual expenditures surpass the budgeted amount, the Contractor shall refund the difference to the SFWIB forthwith. If the Contractor does not repay the difference within thirty (30) calendar days following the SFWIB's notification of overpayment, the SFWIB will charge the Contractor the lawful rate of interest on the outstanding amount.
- C. The following required Financial Closeout documents shall be submitted by the Contractor:
 - 1. Final Expenditure Report (**Enclosure 1**)
 - 2. Year to Date Reconciliation between specified line items in Enclosure 2 by fund and actual expenditures by line item
 - 3. Year to Date General Ledger for the SFWIB's expenditures only
 - 4. Indirect Cost Reconciliation
- D. Upon the request of the Contractor, the SFWIB's Accountant will provide technical assistance on completing the Financial Closeout.
- E. Contractors shall complete and submit to SFWIB an annual fiscal audit report within six months after the end of the fiscal year and in compliance with 2 CFR Chapter II, Subpart F, §200.512(a).

III. Procedure

A. **Salaries/Wages**

Staff persons may be paid for absences (vacations, sick leave, etc.), if such a provision for payment is included in the Contractor's personnel policies and procedures manual that was submitted as part of the operational documents. All Contractors are encouraged to allow staff to take time off rather than issue payment for leave time.

Staff persons may be paid for unused vacation time once they are terminated from the program. This payment shall be charged to staff salaries unless such payment, when added to the total salary, exceeds the maximum salary established in the operating budget.

B. **Insurance**

The Contractor shall keep in force all insurance policies, which are applicable to their program(s).

C. Professional Service, Sub-Contract & Rental Agreements

The Contractor shall cancel all of the following services, which will not be applicable to any future contract with the SFWIB:

1. All professional service agreements and sub-contract agreements paid by funds generated from this Contract;
2. All rental contracts associated with office space, equipment, and/or vehicles and maintenance contracts which are paid with funds generated from this Contract;
3. All utility services associated with the operation of Contractor's program (i.e. telephone, electricity, water) paid by funds generated from this Contract.

D. Completion of Financial Closeout**1. Final Expenditure Report (Enclosure 1):**

The Contractor shall submit an actual expenditure report within thirty (30) days following the end of the contract. This report shall reflect:

- A summation of the cumulative expenditures incurred by the Contractor for providing the contracted services.
- A summation of the cash reimbursements and credits received by the Contractor for providing the contracted services.
- The difference between the approved expenditures and the reimbursements received by the Contractor. This difference will reflect either an amount that is due and payable to the Contractor or an overpayment that the Contractor received that is due and payable to the SFWIB.

2. Year to Date Reconciliation between specified categories by fund and actual expenditures (Enclosure 2):

The SFWIB Year to Date General Ledger must be presented as supporting documentation.

3. Indirect Cost Reconciliation: noting indirect costs charged in comparison to actual indirect cost. Refunds may be requested for overages.**E. The SFWIB's Accountant Responsibility**

The SFWIB's Accountant assigned to the contract will provide technical assistance to complete the Financial Closeout upon request.

The SFWIB's Accountant will perform the following functions:

1. Verify that all required enclosures are completed accurately, signed and dated.
2. Verify Contractor's total expenditure against the financial records and the budget amounts to confirm there are no overages.

FINAL EXPENDITURE REPORT

Contractor Name: _____	Prepared By: _____
Program Name: _____	Index Code: _____

CUMMULATIVE PROGRAM EXPENDITURES

Year to Date Expenditures Approved by SFWIB (from Payment Requests)

\$	-
----	---

Purchases made by the SFWIB on behalf of the Contractor

\$	-
----	---

Less: Year to Date Late Invoicing Amount

\$	-
----	---

Total Expenditures

\$	-
----	---

CUMMULATIVE PAYMENTS

Year to Date Cash Payments Received from SFWIB

\$	-
----	---

Purchases made by the SFWIB on behalf of the Contractor

\$	-
----	---

Total Payments

\$	-
----	---

BALANCE DUE TO CONTRACTOR (if not applicable enter zero)

\$	-
----	---

or

BALANCE DUE FROM CONTRACTOR (if not applicable enter zero)

\$	-
----	---

Please detail any balance(s) due from Contractor by invoice packages: _____

Pursuant to the terms of this Contract between the Contractor listed above and the SFWIB, and in consideration of the total amounts earned and paid to the Contractor for performance, which equals \$_____ the Contractor does remise, release, and discharge the SFWIB, its officers, agents, and employees, of and from all liabilities, obligations, claims, and demands whatsoever under or arising from this Contract. **The Contractor's submission of the Financial Closeout Package is a complete release and waiver of any and all liability, claims or causes of action that allegedly resulted from engagement of and/or performance under this Contract and acknowledges the SFWIB has fully performed and satisfied any and all of its obligations due under this Contract.**

By signing this report, I certify to the best of my knowledge and belief that the report is true, complete and accurate and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise.

Name of Official Authorized to Sign the Contract

Signature of Official Authorized to Sign the Contract /Date

CLOSEOUT RECONCILIATION CAREER CENTERS

	1	2	3	4	5	6	7
	Budget Original	Budget Adjustment	Budget Revised*	Actual Expenditures	Difference (3-4)	General Ledger	Difference (6-4)
WIA							
Programmatic							
Salary	\$ -	-	-	-	\$ -	-	\$ -
Fringe Benefits	\$ -	-	-	-	\$ -	-	\$ -
Participant Cost	\$ -	-	-	-	\$ -	-	\$ -
Other Programmatic Costs	\$ -	-	-	-	\$ -	-	\$ -
Indirect Cost	\$ -	-	-	-	\$ -	-	\$ -
Profit	\$ -	-	-	\$ -	\$ -	-	\$ -
Total	\$ -	-	\$ -	\$ -	\$ -	-	\$ -
Administrative							
Salary	\$ -	-	-	-	\$ -	-	\$ -
Fringe Benefits	\$ -	-	-	-	\$ -	-	\$ -
Participant Cost	\$ -	-	-	-	\$ -	-	\$ -
Other Administrative Costs	\$ -	-	-	-	\$ -	-	\$ -
Indirect Cost	\$ -	-	-	-	\$ -	-	\$ -
Profit	\$ -	-	-	\$ -	\$ -	-	\$ -
Total	\$ -	-	\$ -	\$ -	\$ -	-	\$ -

FSH (July to Sept)

Programmatic

Salary	\$	-	\$	-	\$	-	\$
Fringe Benefits	\$	-	\$	-	\$	-	\$
Participant Cost	\$	-	\$	-	\$	-	\$
Other Programmatic Costs	\$	-	\$	-	\$	-	\$
Indirect Cost	\$	-	\$	-	\$	-	\$
Profit	\$	-	\$	-	\$	-	\$
Total	\$	-	\$	-	\$	-	\$

Administrative

Salary	\$	-	\$	-	\$	-	\$
Fringe Benefits	\$	-	\$	-	\$	-	\$
Participant Cost	\$	-	\$	-	\$	-	\$
Other Administrative Costs	\$	-	\$	-	\$	-	\$
Indirect Cost	\$	-	\$	-	\$	-	\$
Profit	\$	-	\$	-	\$	-	\$
Total	\$	-	\$	-	\$	-	\$
Grand Total	\$	-	\$	-	\$	-	\$

FSH (Oct to June)

Programmatic

Salary	\$	-	\$	-	\$	-	\$
Fringe Benefits	\$	-	\$	-	\$	-	\$
Participant Cost	\$	-	\$	-	\$	-	\$
Other Programmatic Costs	\$	-	\$	-	\$	-	\$
Indirect Cost	\$	-	\$	-	\$	-	\$
Profit	\$	-	\$	-	\$	-	\$
Total	\$	-	\$	-	\$	-	\$

Administrative

Salary	\$	-	\$	-	\$	-	\$
Fringe Benefits	\$	-	\$	-	\$	-	\$
Participant Cost	\$	-	\$	-	\$	-	\$
Other Administrative Costs	\$	-	\$	-	\$	-	\$
Indirect Cost	\$	-	\$	-	\$	-	\$
Profit	\$	-	\$	-	\$	-	\$
Total	\$	-	\$	-	\$	-	\$
Grand Total	\$	-	\$	-	\$	-	\$

UCB

Programmatic

Salary	\$	-	\$	-	\$	-	\$
Fringe Benefits	\$	-	\$	-	\$	-	\$
Participant Cost	\$	-	\$	-	\$	-	\$
Other Programmatic Costs	\$	-	\$	-	\$	-	\$
Indirect Cost	\$	-	\$	-	\$	-	\$
Profit	\$	-	\$	-	\$	-	\$
Total	\$	-	\$	-	\$	-	\$

Administrative

Salary	\$	-	\$	-	\$	-	\$
Fringe Benefits	\$	-	\$	-	\$	-	\$
Participant Cost	\$	-	\$	-	\$	-	\$
Other Administrative Costs	\$	-	\$	-	\$	-	\$
Indirect Cost	\$	-	\$	-	\$	-	\$
Profit	\$	-	\$	-	\$	-	\$
Total	\$	-	\$	-	\$	-	\$
Grand Total	\$	-	\$	-	\$	-	\$

UCRE

Programmatic

Salary	\$	-	\$	-	\$	-	\$	-
Fringe Benefits	\$	-	\$	-	\$	-	\$	-
Participant Cost	\$	-	\$	-	\$	-	\$	-
Other Programmatic Costs	\$	-	\$	-	\$	-	\$	-
Indirect Cost	\$	-	\$	-	\$	-	\$	-
Profit	\$	-	\$	-	\$	-	\$	-
Total	\$	-	\$	-	\$	-	\$	-

Administrative

Salary	\$	-	\$	-	\$	-	\$	-
Fringe Benefits	\$	-	\$	-	\$	-	\$	-
Participant Cost	\$	-	\$	-	\$	-	\$	-
Other Administrative Costs	\$	-	\$	-	\$	-	\$	-
Indirect Cost	\$	-	\$	-	\$	-	\$	-
Profit	\$	-	\$	-	\$	-	\$	-
Total	\$	-	\$	-	\$	-	\$	-

Grand Total

Grand Total	\$	-	\$	-	\$	-	\$	-
Grand Total - ALL	\$	-	\$	-	\$	-	\$	-

INDIRECT COSTS

Base
x Approved Indirect Cost Rate
= Total Indirect Costs
or the lesser of 10% Adm. Cost

\$	-
\$	-